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ABSTRACT

This newsletter theme issue focuses on accomplishments around the country in finding new and alternative funding sources and support strategies for supported employment programs serving people with disabilities. It looks at the impact of long-term supports, their relationship to a range of supported employment services, and different types of service and funding arrangements. Common elements are identified, stressing the importance of collaboration, flexibility, and new ways of thinking. Individual newsletter sections address: long-term services and supports, including job-specific supports and individual and community supports; Medicaid home and community-based waiver program (Title IX); the Job Training Partnership Act; the Plan for Achieving Self-Support; and the Impairment-Related Work Expense (for establishing eligibility to receive Social Security benefits). (DB)

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Supported Employment: Long Term Funding Supports and Services for People with Severe Disabilities

RRTC
Rehabilitation Research and
Training Center at Virginia
Commonwealth University

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Vol. 3, 1993

RRTC

"Improving Supported Employment Outcomes for Individuals with Developmental and Other Severe Disabilities"

REHABILITATION RESEARCH AND TRAINING CENTER AT VIRGINIA COMMONWEALTH UNIVERSITY

Supported Employment: Long Term Funding Supports and Services for People with Severe Disabilities

Now that supported employment has been developed and people with disabilities have experienced what is possible, we can do nothing short of making it available to everyone who needs and wants it. Each state is struggling with this task; as it changes and improves services to people who experience disabilities. Continual growth in our technology, methods, and competencies makes it possible for people with varying abilities to work successfully. New designs in assistive technology, new ways of supporting people with behavioral challenges, and new projects with employers are improving our abilities to assist people to be successful in employment. As our capacities to support people grow; so do our waiting lists. To meet this ever increasing demand, growth is essential in long-term funding, resources, and supports.

Ongoing development of long-term financial resources is essential to meet the needs of people entering supported employment. Many state vocational rehabilitation programs have successfully implemented cooperative agreements and leveraged extended service dollars from long-term funding agencies. These funds are predominantly from state agencies of mental health (MH), mental retardation (MR), and other developmental disabilities (DD). As traditional providers of ongoing services, MR/MH/DD agencies purchase extended employment supports with both new dollars and a redirection of funds typically used for day programs and sheltered work. Long-term funding for people with other disabilities, such as, physical and sensory impairments, is at significantly lower levels. Some states are securing dollars through Medicaid, Social Security, and legislative appropriations. Yet, alternative funding and funding for persons with varying disabilities is still very limited in scope.

For supported employment services to be available to the full population of people with varied and significant challenges to employment, new and alternative funding sources and support strategies must be developed. With limited resources in the midst of national and state recessions, critical accomplishments in all states are necessary to ensure the ongoing availability of supports for people with severe disabilities in community jobs. These critical accomplishments include the following:

Critical Accomplishments to Ensure Ongoing Supports

- **Increasing the use of existing funding sources, such as the Medicaid Waiver and Social Security Work Incentives;**
- **Improving the use of existing service dollars by reallocating funds from segregated day programs to supports in community employment;**
- **Redirecting short-term funding, which traditionally purchases pre-placement activities, to supports that facilitate job stability;**
- **Identifying new dollars from diverse sources, such as community foundations or employer fees;**
- **Adjusting funding structures for more efficient use of services, attaching ongoing dollars to people rather than slots, and providing individualized services rather than group programs;**
- **Improving the competencies of staff for more cost-efficient, quality services;**
- **Using natural sources of supports from employers, co-workers, and other people in the community;**
- **Maintaining and disseminating data around costs, outcomes, benefits, and needs; and**
- **Using collaborative efforts in developing innovative approaches to ongoing supports.**

This newsletter shares examples of these accomplishments. It looks at the impact of long-term supports, their relationship to a range of supported employment services, and different types of service and funding arrangements. Common themes are presented that encourage collaboration, flexibility, and new ways of thinking about the usual ways of doing business.

Long-Term Services and Support

Long-term funding is the unique feature of supported employment that makes it possible for people with severe disabilities to sustain employment over time. On and off-site assistance and support continue indefinitely and differ significantly from services in day programs and other segregated models. For example, more traditional models move people through a continuum of program criteria in order to successfully transition them to competitive work. Unfortunately, independence from the service system is rarely achieved by people with severe disabilities when served through this approach.

Congress recognized the value of supported employment in 1986 and identified this approach as a vocational outcome in the Rehabilitation Act Amendments (Federal Register, 1987). It authorized funding under Title I and Title VI-Part C for "time-limited post-employment services" leading to supported employment. The Act includes "ongoing support services" as an essential element of supported employment and requires the availability of "extended services" before vocational rehabilitation funding can begin.

On-going supports, as defined in the amended regulations for the Federal Supported Employment Program (Federal Register, June 24, 1992, p. 28438), are those "needed to support and maintain an individual with severe handicaps in supported employment." They are the activities and relationships which help a person maintain a job in the community. Supports differ for each individual and vary widely in type and intensity for the duration of employment. Those provided through the services of a job coach or employment specialist may be **"job-specific"** or **"individual community supports."**

Job-specific supports include activities such as:

- **ongoing assessment and performance evaluations,**
- **job modifications and adaptive design,**
- **job training and assistance,**
- **natural supports,**
- **service and funding coordination,**
- **transportation arrangements,**
- **consultation and supports to employers and co-workers, and**
- **advocacy assistance**

Individual and Community Supports

Individual and community supports assist in other areas of living which can influence success on the job. They include activities that help with:

- **living situations,**
- **budgeting and spending money,**
- **leisure time,**
- **using community resources, and**
- **developing relationships and other natural supports.**

Medicaid Home and Community-Based Waiver Program (Title IX)

The Medicaid program is the largest source of federal funding for ongoing specialized services to people with developmental disabilities (Smith and Gettings, 1991). Since 1986, it has offered federal financing of supported employment services, however it remains underutilized as a means of assisting people to achieve and sustain integrated employment in the community.

Smith and Gettings (1991) studied the use of the Medicaid waiver program and found it a largely untapped funding source for long-term supported employment services. By 1990, only 27 of the 43 states with Home and Community Based (HCB) waiver programs included coverage of supported employment services. While containing its share of complexities, it offers states the opportunity to expand their employment initiatives to include extensive services to people with significant challenges to integrated community living. It is most attractive in its application to people with severe, multiple disabilities who remain largely unserved in supported employment.

Smith and Gettings (1991) note that the provisions contained in the State Medicaid Manual allow coverage of a wide range and variety of supports for HCB waiver participants who are eligible for federal financing of their supported employment services. **Eligible participants, at present, must be previous residents of an institution, nursing facility, or ICF/MR.** Funds are available to people ineligible for the state vocational rehabilitation program or completing time-limited services and for individuals with no other source of funding. To participate, ongoing supports "to perform in a work setting" must be necessary (State Medicaid Manual, Part IV-Services, Section 4442.3.c). The HCB waiver program offers states considerable latitude in funding and service strategies for covering services and supports to assist individuals with developmental disabilities achieve and sustain integrated employment in the community.

Participation in the Home and Community-Based Waiver Program

While the use of the HCB waiver program for supported employment services remains relatively low, it is steadily increasing as states begin to include it in their waiver plans. In 1986, only three states covered supported employment services in their waiver plans, but this number has grown significantly and is expected to increase substantially (Smith and Gettings, 1991). While these authors estimate that over 28,000 waiver participants are eligible for supported employment services, only 5% are actual recipients, 78% of whom reside in six states (CT, MI, MN, NH, OR, UT). As individual states improve their employment initiatives and services to people with the most severe disabilities, use of the waiver in supported employment services is expected to grow significantly.

Oregon has been particularly successful in utilizing its HCB waiver program and has the highest percentage nationally of eligible participants receiving waiver-funded supported employment services (Smith and Gettings, 1991). The State Developmental Disabilities Office, administering both its OSERS Title III project and its Medicaid program, has successfully linked these two initiatives. Through technical assistance and training, it has developed a system of supported employment providers and has the third highest placement rate nationally (Wehman, 1991). Oregon has adopted strong policy language promoting integrated employment as the desired option, requires that all HCB waiver participants be considered for employment during their annual service planning, and encourages provider flexibility and creativity. The HCB waiver program offers states considerable latitude in funding and service strategies for covering services and supports to assist individuals with developmental disabilities achieve and sustain integrated employment in the community. Smith and Gettings (1991) note the availability of the following:

HCB Waiver Service and Funding Approaches

- **A full range of services** which can span the entire employment experience. This includes those typically provided to supported employees such as ongoing assessment, job development, placement, on the job training and supervision, transportation, assistive devices, and related training.
- **Flexible arrangements** which allow individuals with significant needs to work fewer than 20 hours and receive a combination of day support services. Earnings can be at, above, or below minimum wage.
- **Diverse payment strategies** including, but not limited to, hourly service fees, uniform or individualized daily rates, and flat payment rates.
- **Favorable payment rates** for supported employment services that are comparable to other funding sources and tied to activities specific to individual consumers.

(Smith & Gettings, 1991)

Job Training Partnership Act

Public Law 97-300, the Job Training Partnership Act (JTPA), took effect in 1984. It was designed to reduce welfare dependency and increase the employment and earnings of youth, unskilled adults, economically disadvantaged, and other individuals facing serious barriers to productive employment (Job Training Partnership Act, 1982). Funding is available for establishing job assistance and training programs. Federal regulations encourage attention to hard to serve populations including people who experience disabilities.

JTPA has been used by several states as a funding source for supported employment services. It has not been used extensively for people with severe disabilities or in funding of ongoing and extended services because of its traditional focus on pre-employment training and job placement. This may change as supported employment providers and advocates look for alternative sources of funding and learn more about the JTPA delivery system. While the use of JTPA funds has its share of difficulties, it offers services regardless of the type or severity of disabilities and supports activities based on local discretion of need. This makes it applicable to individuals who require long-term supported employment services.

Application to Supported Employment

A job training plan must provide employment and training services to people who can benefit from and are most in need of these opportunities. While JTPA services have traditionally been pre-employment training and placement, the regulations do include provisions for upward mobility and retraining, occupational development, supportive and follow-up services, and customized training which are all services typical to extended supported employment. JTPA regulations require efforts within service delivery areas for equitable services among populations in need. Performance standards and program lengths may be adjusted to accommodate needs of people with significant barriers to employment and requests can be made for a ceiling waiver on support costs of these groups.

Title II Part A 6% Funds

Title IIA provides states with funding for employment training for disadvantaged adults and youth. Seventy-eight percent of each state's allotment is allocated to local service delivery areas (SDA) according to the unemployment trends and economic needs of the area. These funds are available for services to individuals with disabilities. An additional 6% is reserved for incentive grants to programs serving increased numbers of hard-to-serve individuals. Funds are also available to track post program experiences of the participants. Any of these funds not used may be used to provide technical assistance to the SDAs.

A Private Industry Council (PIC) and local provider in West Virginia have been able to access Title II Part A 6% funds for extended supported employment services (Ian Rudick, personal communication, August 20, 1991). The service provider was familiar with this incentive funding and worked closely with the local PIC to develop a JTPA program providing ongoing training and supports to people with severe disabilities. Through a performance based staffing contract, an employment specialist is available at the provider agency to assist people on an ongoing basis to enhance their employment experiences and earnings.

Suggestions for Accessing JTPA Funds

The Job Training Partnership Act is a major employment and training legislation which impacts on individuals with and without disabilities (Tindall, 1987). Yet, Wehman (1991) notes that only 19 states reported using JTPA funding for supported employment in fiscal year 1989. This represents the smallest amount of non-Vocational Rehabilitation funds used in the delivery of supported employment services. Making JTPA funds available to individuals with severe disabilities and redirecting it into long-term services and supports will involve the following.

Suggestions for Accessing JTPA Funds

- Understand the delivery system and work closely with the local PIC (Knight, 1987). Familiarity with the state and local job training plans and the JTPA programs in the community can facilitate the process. Learn if people with disabilities are being served and how Title IIA 6% funds are being used.
- Demonstrate how supported employment services can serve high-need groups and accomplish new and established goals of the job training plan. This approach can help to spark the interest of the PIC. Ongoing discussions and information sharing are essential.
- Demonstrate successful outcomes and negotiate small contracts initially. Work collaboratively with other JTPA programs in the SDA.
- Encourage employers, participants, and families to request the targeting of funds for supported employment services for people with severe disabilities.
- Review and comment on the Governor's Coordination and Special Services Plan. Include supported employment representation, from both the private and public sector, on the State Job Training Coordinating Committee and the local Private Industry Council.

Plan for Achieving Self-Support

The purpose of a PASS is to decrease an individual's reliance on government benefits by increasing his/her earning capacity (O'Mara, 1991). It provides financial assistance for purchasing goods or services in order to reach a long-term employment goal. A PASS can help an individual establish eligibility for SSI, maintain SSI and SSDI benefits, or increase the amount of monthly cash payments. Income and/or resources are set aside, either as a savings plan for future expenditures or for direct purchase of equipment, services, and supports needed to work. This money is excluded from countable income and resources in determining eligibility and the amount of SSI benefit. It is then replaced, often dollar for dollar, in the monthly SSI cash payment.

Plans for Achieving Self Support can make it possible for an individual with a disability to hire a job coach to provide follow-along support on a time limited basis. Financial assistance is available for up to four years for one PASS (O'Mara, 1989). The initial plan can be approved for a period of 18 months. If a plan does not result in the expected self-support, a new PASS with a new occupational objective is possible. These extensions are available for 18 and 12 months respectively.

A PASS will be different for each person and can be used for almost any expense which helps to achieve an individual work goal (U.S. Department of Health and Human Services, 1991). Anyone can help an individual to write his/her plan, and the costs of developing it may be included within the PASS (O'Mara, 1989). A PASS must include the following five components:

- **Individualized obtainable vocational goal(s),**
- **Time frame for meeting the goal(s),**
- **Identification of sources and the amount of income or resources to be set aside,**
- **Explanation of how the money will be spent, &**
- **A written plan.**

Assistance is available from a Social Security representative, and sample plans are provided in a guide available from the Social Security Administration (SSA) entitled, Working While Disabled (1991). The following sample for developing a PASS plan comes from this guide.

Plan for Achieving Self-Support

Name: _____ **SSN:** _____

My Work Goal Is:

My plan will begin: _____ **I plan to reach my goal on:** _____

I will have the following expenses to meet my goal:

- **item**
- **connection to goal**
- **month(s) paid**
- **cost**
- **total**

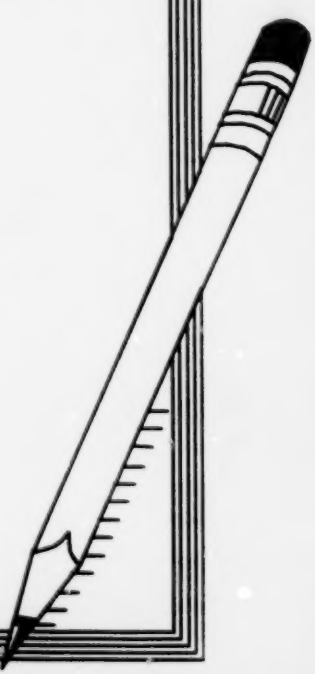
I expect to receive the following income that I will use to reach my goal:

I will keep the money at the following bank: _____

I am/am not already working or saving toward this goal.

Individuals who will help in this goal:

Signature and date: _____



Impairment-Related Work Expense

An Impairment-Related Work Expense (IRWE) can help establish financial eligibility for SSI and SSDI, maintain SSDI entitlement, or increase SSI monthly cash payments (O'Mara, 1991). The IRWE work incentive is designed to help individuals recover some of those expenses that occur as a result of their disabilities and directly enable them to work. For SSI recipients, these personal expenses are deducted from monthly gross wages when calculating SSI benefits, resulting in an increase in cash payments of up to half the costs incurred (Koehler and Ellis, 1990). Nonrecurring expenses may be prorated over a 12-consecutive month period. An IRWE can establish benefit eligibility by reducing countable earned income. It can be particularly valuable for SSDI beneficiaries who will lose monthly cash payments as earnings reach or exceed prescribed limits. For these individuals, a wise financial decision may be to pay for their own long-term support costs.

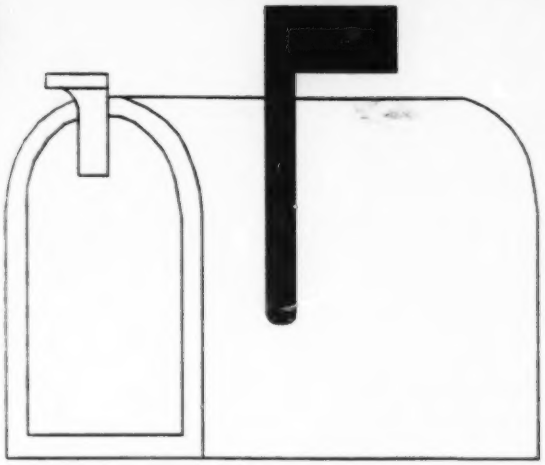
An IRWE must be directly related to an individual's disability and paid for by the individual. It must be paid for within the month the individual is working and not reimbursed by another source. An IRWE is not a written plan. It is a monthly report of expenditures used by the Social Security representative in calculating total countable income and determining continued eligibility or amount of monthly cash payments. The Social Security Administration must have proof for every IRWE claimed by the worker with a disability. This includes a) name and address of prescribing source (doctor, VR counselor); b) impairment for which it is prescribed; c) receipts and canceled checks. Some of the expenses that may be reimbursed using an IRWE include the following:

Impairment-Related Work Expenses

(Adapted from: Red Book on Work Incentives, 1991).

1. **Attendant care services:**	assistance in getting ready for work, going to and from work, a reader for the blind, an interpreter for the deaf, etc.
2. **Medical devices**:	wheelchair, dialysis equipment, respirators, pacemakers, pacers, etc.
3. **Prosthesis**:	artificial arm, hip, or leg.
4. **Work-related equipment**:	special typewriter, telecommunication devices, specially modified tools, braille devices, electronic visual aids, etc.
5. **Residential modifications**:	ramps, railings, doorways to get to and from work, work space in home for self-employment at home.
6. **Drugs and medical services**:	physical therapy, chemotherapy, anticonvulsant and antidepressant drugs, etc. (if regularly prescribed and necessary for controlling disabling conditions).
7. **Medical supplies:**	catheters, face masks, bandages, elastic stockings, etc.
8. **Guide dog**:	food and vet bills etc.
9. **Transportation costs**:	modification of vehicles, special transportation.

Mailing List Alert



This newsletter is the last mailing that we will have using the old RRTC mailing list. We are making a clean sweep to eliminate duplicates and individuals who no longer want to be on our list. Therefore, we are developing **a new mailing system.** The old list is going to be deleted! If you want to be included on our new list, you must fill out this form. If you have already let us know that you want to continue receiving our mailings or that you want your name deleted, **pass this form on to a friend who would like to hear from us.**

Mailing List Form

DATE: _____ **PHONE:** _____

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ORGANIZATION: _____

ADDRESS: _____

_____

Organization/Designation (check one)

- ___ Consumer Organization (Independent Living Center)
- ___ Education (e.g. school district, LEA, DOE, K-12)
- ___ Employer
- ___ Governmental Agency (e.g. NIDDR, OSERS, SSA, DDC)
- ___ Mental Health/Mental Retardation
- ___ Parent Organization (e.g. PEATC)
- ___ Professional Organization (e.g. APSE, TASH, ARC, Goodwill)
- ___ RRTC
- ___ UCP
- ___ University
- ___ Vocational Rehabilitation

Individual Designation (check all that apply)

- ___ Service Provider
- ___ Consumer
- ___ Parent

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Urgent!! Mailing List Alert.

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Virginia Commonwealth University Rehabilitation Research and Training Center on Supported Employment

The Virginia Commonwealth University Rehabilitation Research and Training Center on Supported Employment, funded in 1988 by the National Institute on Disability and Rehabilitation Research, provides research, training, and leadership on supported employment for citizens with developmental and other severe disabilities. Research at the RRTC focuses on supported employment policy analysis, program implementation at the systems and consumer level, and program evaluation issues. The RRTC provides training for rehabilitation counselors, program managers, employment specialists, consumers, educators, employers, parents, and other persons interested in supported employment.

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If special accommodations are needed, please contact Mike Barcus, at VCU-RRTC, VCU Box 2011, Richmond, VA 23284-2011, Phone (804) 367-1851, TDD (804) 367-2494. Specific information regarding this newsletter should be addressed to Ms. Katherine Inge at this same address. Funding for this publication is provided by the U.S. Department of Education, Grant # H-133B80052-92.

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It is available from our dissemination office for $9.95. Contact Jan Smith for additional information.

Additional References:

Koehler, F., & Ellis, J. (1990). Project WIN: Work incentives network training manual. Richmond, VA: Association for Persons in Supported Employment.

O'Mara, S. (1989). PASS manual. Richmond, VA: Virginia Office of Supported Employment, Department of Mental Health, Mental Retardation and Substance Abuse Services.

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Smith, G. A., & Gettings, R.M. (1991). Supported employment and medicaid financing. Alexandria, VA: National Association of State Mental Retardation Program Directors.

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